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INTRODUCTION: TOWARDS A SOCIOLOGY OF AGEING IN CENTRAL AND EASTERN EUROPE

While Central and Eastern European (CEE) countries have not yet dealt with all social problems resulting from the post-communist transformation process they are faced with a new challenge – the transition towards ageing societies. Demographic projections indicate that CEE is en route towards becoming the oldest part of Europe in the second half of the 21st century. This article argues that the sociology of ageing is uniquely equipped with the necessary toolkit for analysing emerging social problems and social cleavages characteristic of ageing societies and for proposing mechanisms for their solution. Subsequently, we will outline the contribution of sociology of ageing theory building to the analysis of ageing societies, beginning with the international sociology of ageing before focusing specifically on the sociology of ageing in CEE. The introduction of the articles in this Special issue of *STUDIA SOCIOLOGICZNE* is embedded in this discussion.

Key words: population ageing; sociology of ageing; Central and Eastern Europe.

Introduction

The ‘velvet’ or ‘peaceful revolutions’ that swept away communist rule across Central and Eastern Europe (CEE) occurred quarter of a century ago. In its aftermath, the social institutions of the post-communist societies had to be re-organised completely. The social fabric and social structures in these societies underwent dramatic changes. These changes were also felt at the micro-level of society where individuals were faced with dramatic changes of their personal circumstances: previously unknown gains such as freedom of speech or freedom

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of travel were accompanied with equally unknown risks, such as unemployment, poverty, social exclusion, access to health care based on financial resources rather than political loyalty, etc. Many have experienced personal hardship they had not been exposed to in the past; new social cleavages emerged. The people of CEE found it difficult to adjust to their changed social environment “– and, as a consequence, they also changed their behaviour in regard to other aspects of life. This included decisions about having children or not, as well as the decision of leaving their country of origin altogether, temporarily or for good.” (Hoff 2008: 15).

The societal transformation process that started in 1989/1990 has not come to an end yet. Today, this transition period has become intertwined with another, demographic transition: CEE is ageing rapidly – using the metaphorical label suggested in a World Bank publication CEE is turning “From Red to Gray” (Chawla et al. 2007). The ‘drivers of demographic change’ rising life expectancy, falling fertility and significant outmigration have been at work across CEE (Hoff 2011). In 1990, only 10.0–13.2% of today’s EU member states in CEE populations were aged 65 years and older (10.0 per cent in Poland – 13.2% in Hungary) – until 2010 their respective proportions had risen to 13.5–17.5% (13.5% in Poland – 17.5% in Bulgaria). Population ageing in CEE is projected to accelerate over the coming years. By 2030, the share of older people (65+) is projected to reach between a fifth and a quarter (20.2% in Romania – 24.2% each in Bulgaria and Slovenia) and by 2050 between more than a quarter and nearly a third of their respective populations (27.6% in Lithuania – 31.1% in Bulgaria). By 2060 the oldest societies on the European continent will be in CEE, where more than a third of the population will be aged 65 years and older in Latvia (35.7%), Romania (34.8%), Poland (34.5%) and Slovakia (33.5%) (Lanzieri 2011). Nevertheless, there is substantial regional variation across CEE and also within countries, with a generally higher share of older people in rural areas whereas the metropolitan cities provide growing attractiveness for the younger generations¹.

As we emphasized elsewhere, the challenge posed by population ageing to the ‘Eastern-European Ageing Societies in Transition’² is greater than in most

¹ Eg. Paper presented by Andreas Hoff ‘The future of welfare in Central and Eastern Europe in the light of rapid demographic ageing’. Keynote Paper given at the scientific conference “Demographic Change in Central and Eastern Europe (CEE) – JPI More Years, Better Lives” organised by the Austrian Federal Ministry of Science, Research and Economy in Vienna, 24 March 2015.

² ‘Eastern-European Ageing Societies in Transition’ (EAST) is the name of a research network bringing together researchers on the social and societal aspects of population ageing across CEE. EAST is coordinated by the Oxford Institute of Population Ageing and was established by Andreas Hoff in 2005. More details can be found here: <http://www.ageing.ox.ac.uk/research/regions/europe/east>.

European countries since CEE countries are growing old before they had the chance to accumulate wealth (*Population Ageing...*, 2011 ed. by A. Hoff), both at societal and individual level. The sociology of ageing is uniquely equipped with the necessary toolkit for analysing new social problems and social cleavages in ageing societies and for proposing mechanisms for their solution. In the following section, we will outline the contribution of sociology of ageing theory building to the analysis of ageing societies, beginning with the international sociology of ageing before focusing specifically on the sociology of ageing in CEE.

Introducing the Sociology of Ageing

What constitutes the sociology of ageing? According to Matilda Riley, Anne Foner and Joan Waring (1988) the ‘sociology of age’ deals with both social processes of aging over the life course and age as a structural feature of societies. As in general sociology, the sociology of ageing differentiates micro-level (individual level or socio-psychological level) and macro-level (society level or social-structural level) perspectives on the one hand, and normative and interpretative perspectives on the other (Marshall and Bengtson 2011). The following definition exemplifies this: The sociology of ageing “is concerned with the social aspects of both individual aging and an aging society. The individual experience of aging depends on a variety of social factors, including public policies and programs, economic status, social support, and health status.” (Willson 2007: 148)

Although it is common sense in the gerontological literature by now to consider the social implications of age and ageing, the ‘sociology of ageing’ is rarely mentioned in gerontological textbooks. In most cases, social issues and the analysis of social phenomena related to ageing are subsumed under social gerontology, sometimes also under broader headings such as ‘ageing of societies’ (e.g. in Johnson, 2005; Binstock and George 2006), ‘ageing and social structure’ (e.g. in Binstock and George 2006; Dannefer and Phillipson 2010a), or ‘social aspects of ageing’ (e.g. in Wilmoth and Ferraro 2013). The *Handbook of Sociology of Ageing*, which is jointly edited by Richard A. Settersten Jr. and Jacqueline L. Angel, is a noticeable exception (Settersten and Angel 2011a).

Sociological theories such as structural functionalism, social conflict theory, social interaction and exchange theory, symbolic interactionism and phenomenology, social constructivism and the classical writings of Durkheim, Marx and Weber also form the theoretical framework in which sociologists of ageing operate (Settersten and Angel 2011b). Beyond that, the sociology of ageing developed its own set of theoretical approaches to make sense of empirical findings.

Although the concept of disengagement theory has remained controversial until the present day (Achenbaum 2009; Backes and Clemens 2013) the publication of Cumming and Henry's book *Growing Old: The Process of Disengagement* in 1961 is widely considered as the first attempt to generate a formal theory on ageing processes by social scientists (Lynott and Passuth Lynott 1996), and thus as the kick-off of the sociology of ageing. Cumming and Henry suggested that "Aging is an inevitable, mutual withdrawal or disengagement, resulting in decreased interaction between the aging person and others in the social system he belongs to." (Cumming and Henry 1961: 14) This proposition has sparked an intense debate among social scientists with a research interest in ageing because of its universal determinism and their insistence that this withdrawal was functional for society. Critics also noted that the influence of social factors such as gender, occupational or family status, ethnicity or class was ignored.

Almost immediately, a competing approach was proposed to challenge disengagement theory – activity theory (Havighurst 1963; Neugarten 1964) – which in contrast to disengagement theory has remained popular with sociologists of ageing and with social gerontologists until the present day in the format of the 'active ageing' approach (see, for example, Walker 2002; Zaidi et al. 2013; Zaidi and Stanton 2015). In a nutshell, activity theory proposes that satisfaction in old age depends on continuous involvement in meaningful activities. Activity theory, however, was criticized for ignoring health and socio-economic disparities that may restrict older peoples' choice or interest in maintaining familiar activities (Achenbaum 2009).

Another crucial point of departure for the emergence of the sociology of ageing was the development of 'age stratification theory', which linked individual life courses with the social and historical context. Riley, Johnson & Foner (1972), Riley (1987) as well as Riley and Riley (1994) are commonly credited with establishing this approach. Age stratification theory introduced age as social-structural variable in analogy to the role of class in structuring society. The underlying idea is that social roles and social status are allocated based on age. Individuals learn these social roles based on age through the process of socialization (Riley, Jones and Foner 1972; Riley and Riley 1994). Age defines social roles and the social location throughout the life course. Thus, age becomes a classification variable for social status (Riley 1987) and a dimension of social inequality.

Individual life courses are influenced through interaction with social structures. Since the latter change over time, members of different generations have to negotiate their life courses in different social contexts. Age stratification thus includes the dynamism of social change. New cohorts are born, socialized in a particular social-historical context according to the norms and values of the time, grow up, navigate their life courses and grow old together sharing similar normative convictions, experiencing the same historical events (e.g.

the Great Depression, the Second World War, the September 11, 2001 attacks) at the same time of their lives. Moreover, other factors such as the size of a particular birth cohort influence the life course, making it more competitive or easier to find a job, husband or wife, or retiring with a safe retirement income. This insight brought about new ways of conceptualizing and measuring cohorts and cohort effects, building on the work of another famous sociologist, Karl Mannheim, and his classic essay on *The Problem of Generations* (Mannheim 1928 [2000]).

The life course perspective has become a crucial paradigm of the sociology of ageing, which originates in developmental psychology. Settersten and Angel (2011b) distinguish two strands of the life course perspective – the personological and institutional paradigms (Dannefer and Settersten 2010b; Settersten and Angel 2011b). The personological approach focuses on early-life experiences of individuals and tries to predict their impact on later life phases, including old age. The hypothesis of cumulative advantage/disadvantage (O’Rand and Henretta 1999; Dannefer 2003) is a good example for this approach. In contrast, the institutional approach of life course analysis is not interested in the individual level – it analyses the life course as social/political construct instead. The ‘institutionalization of the life course’ as proposed by Martin Kohli is a good example of this tradition (Kohli 1985).

Images of ageing are another important target area of sociological analysis (Featherstone and Hepworth, 2005). Images of old age and of older people determine their social status and how they are treated in society. These images are not fixed – they are influenced by social norms and values in a particular socio-historical context. “The sociological understanding of ageing as a process of interaction through which older people compare themselves with others requires a great deal more research into how people perceive and respond to images” (Featherstone and Hepworth 2005: 360).

Methodologically, the sociology of ageing has moved from descriptive studies to explanatory research and the analysis of causation, from qualitative and simple quantitative to advanced quantitative, multi-level and multi-method studies, from cross-sectional to longitudinal data, and from small-scale to population based, nationally representative surveys (Settersten and Angel 2011b).

As the listing above shows the sociology of ageing shares its origins with mainstream sociology. Nevertheless, it has taken a number of years until the sociology of ageing was accepted by mainstream sociology and institutionalized as sections of wider sociological associations. Thus, the ‘Section on Aging and the Life Course’ (SALC) of the American Sociological Association (ASA) was initiated in 1979 (Settersten and Angel 2011b). Four years earlier the Research Committee 11 ‘Sociology of Ageing’ of the International Sociological Association (ISA) was established (in 1975) (ISA 2015). The European equivalent, the

European Sociological Association (ESA) includes the ‘Ageing in Europe’ research network³.

The Sociology of Ageing in Central and Eastern Europe and in Poland specifically

As we have shown above, the international sociology of ageing struggled for several decades before it was recognized and institutionalized. The sociology of ageing in Central and Eastern Europe (CEE) is still at the beginning – and so is the process of demographic ageing. During this very decade we are in now we witness an acceleration of population ageing across CEE. At the turn of the millennium the majority of population ageing indicators for CEE countries was below the EU and EFTA average. With the exception of Bulgaria (16.2), Estonia, Hungary (both 15.0) and Latvia (14.8) all EU member states from CEE had a lower proportion of people aged 65 and over than the 14.5 per cent on EU/EFTA average in 2000. Until 2030, the EU/EFTA average proportion of older people is projected to rise to 22.6 per cent – and in all EU member states from CEE except Slovakia the proportion of older people will be within a percentage point of this or above average, with nearly a quarter of the Bulgarian and the Slovenian population being 65 years and over (Lanzieri, 2011). As we argued elsewhere, population ageing in CEE did not only set in later than in Central, Western and Northern Europe – “...its course and impact will be more severe, due to the lack of comprehensive social security, health care / long-term care systems, social services and significant private savings.” (*Population Ageing...*, 2011: 4)

The first sociology of ageing session during a Polish Sociology Congress was organized by the editors of this special issue in September 2007 during the 13th Polish Sociological Congress in Zielona Góra, then titled “Ageing and Society” (*The Ageing Societies...*, 2008 ed. by A. Hoff, J. Perek-Białas). The response to the call for papers was so overwhelming that two sessions with high-quality conference papers were organized instead of one as originally planned. Encouraged by this success, we organized a session at the 14th Polish Sociological Congress in Cracow in 2010, this time explicitly addressing the ‘sociology of ageing’, which was published under the title *Developing the ‘Sociology of Ageing’ to Tackle the Challenge of Ageing Societies in Central and Eastern Europe* (2012). The present special issue is now the third publication in this series of successful sociology of ageing sessions at Polish Sociological Congresses, which we continued at the 15th Polish Sociological Congress in Szczecin in 2013.

³ For more information, please visit the Ageing in Europe website: <http://www.ageing-in-europe.net/>.

This time, we decided to publish the conference proceedings in a Special issue of the most prestigious Polish sociology journal rather than in an edited volume. Participants of the sociology of ageing session at the 15th Polish Sociology Congress in Szczecin were invited to submit a paper. Moreover, the call for papers was more widely circulated to attract attention from other scholars in the field who were unable to participate in Szczecin. The growing number of high-quality research projects in the field of the sociology of ageing in CEE is evident in the number of excellent papers we received in response to this call. Unfortunately, it meant that we could not include all papers in this Special issue that would have deserved it otherwise. We believe that the selected papers presented here provide ample evidence that the sociology of ageing in Poland (as the majority papers come from this country) is flourishing. Furthermore, two excellent articles from the Czech Republic by Marcela Petrová Kafková and from Slovenia by Valentina Hlebec were included.

Before we move on to introduce the papers included in this Special issue, it is important to remind ourselves that the Polish sociology of ageing has a long tradition. Jerzy Piotrowski is the first name that comes to one's mind in this context (Piotrowski 1973), immediately followed by Brunon Synak (Synak 1997, 2002; see also Kojder 2014) who was the first Professor of Sociology with a specialization in the field of Gerontology. Brunon Synak claimed that Polish sociologists have not yet been interested in this topic as much as they ought to (Czekanowski 2012). Many more had an impact on development of sociology of ageing in Poland, like: Wojciech Pędich (1996), Andrzej Zych (1995), Barbara Szatur-Jaworska (2000). A comprehensive overview of Polish sociological contributions to the development of the sociology of ageing can be found in the article *Aging in Poland at the Dawn of the 21st Century* by Janusz Mucha and Łukasz Krzyżowski (2010) as well as in Piotr Czekanowski's book *Spoleczne aspekty starzenia się ludności w Polsce – perspektywa socjologii starości* [Social Aspects of the Ageing Population in Poland. A Perspective of the Sociology of Old Age] (2012). Given the high quality of the papers in this Special issue we think that the Polish / CEE sociology of ageing is moving forward and some of Brunon Synak's concerns have been addressed by now. The interest in the sociology of ageing is growing – both among more senior researchers and among early stage researchers.

The first papers in this journal are related to the topic of care from a sociological perspective (the articles by Gmitrzak-Rosochacka & Raclaw, by Petrová Kafková and by Hlebec). **Magdalena Rosochacka-Gmitrzak** and **Mariola Raclaw** (both from Warsaw University) analyzed the term of informal caregiving for frail older adults as a dynamic process of both instrumental and emotional nature in their paper *Family Caregiving for Frail Older Adults: Risk and Ambivalence*. The authors go beyond mere sociological description by linking it with social policy implications based on their analysis of needs and deprivation

– a consequence of poverty and lack of institutional support. They come to the conclusion that dynamic intergenerational relations are about to be of more and more ambivalent nature.

The subsequent article titled *Older People as Care Givers and Their Roles in the Family in the Era of Active Ageing: the Case of the Czech Republic* by **Marcela Petrová Kafková** deals with caregiving by older people to others. The social roles of older people are analyzed: as grandparents, as caregivers, and as contributors to the economic well-being of their families. The author pays specific attention to the intensity with which older people perform these roles. Her analysis is based on the Survey of Health, Ageing and Retirement in Europe (SHARE), a longitudinal, nationally representative population based survey in 18 European societies and Israel in five (soon six) waves (the Czech data from wave 4, 2010). Czech senior citizens have a relatively high position in the ranking of the Active Ageing Index (see Zaidi et al. 2013; Zaidi and Stanton, 2015) compared to other CEE societies. However, her research also shows that its effect on the well-being of caregivers is negligible.

Valentina Hlebec does not only contribute the Slovenian perspective to the discussion in her article *Care Arrangements among Social Home Care Users in Slovenia*, she also aims to identify universal patterns of care arrangements across country borders. Specifically, she is focusing on social home care which can be seen as part of the solution. Valentina Hlebec uses in-depth analysis of multiple cluster analysis to explore what kinds of users prefer these options in different cultural settings.

It is evident that the change of Polish images and cultures of old age is taking place as a result of intense international migration, which affects the family formation. **Lukasz Krzyżowski**'s paper on *Social Remittances and Modifications of Polish Intergenerational Care Cultures and Polish Migrants in Austria and Iceland and their Elderly Parents* is an example of how intergenerational transfers are shaped by international migration and cultural contexts encountered.

Beata Tobiasz-Adamczyk and **Katarzyna Zawisza** remind us of the importance of regional variation in their paper *Regional Differences and Determinants of Social Capital in Polish Elders*. Thereby, they outline regional differences in informal social capital building in old age and the mediating role of socio-medical determinants taking into account self-rated health, migration background and socio-demographic characteristics of individuals across NUTS1 regions of Poland. Their advanced statistical analysis confirmed statistically significant cross-regional differences in relation to social participation, social support, social networks, trust and loneliness.

Barbara Woźniak with **Katarzyna Zawisza** and **Monika Brzyska** confirmed in their article on *Religion and Health – On the Relationship between*

the Level of Religiousness and Body Functioning in Older Age that religious involvement may have a beneficial influence on individuals' well-being, particularly in old age. In some of the observed cases health status influenced the level of religious involvement and not vice versa. The causal direction of the relationship is not as clear as some theories suggest as the authors convincingly explain in their paper.

Another set of articles focuses on older workers and labour market issues. The paper by **Justyna Stypińska** with the title *Older Workers in the Labour Market in Poland: 40+? 50+? Or only »a plus«?* is based on original research conducted in Małopolska, in which she shows how ageism in the workforce occurs. The second paper on labour market issues is presented by **Konrad Turek** *The Meaning of Age in the Labour Market – A Relationship Model between Employer and Employee* aims at developing a theoretical model outlining relationship patterns between employer and employee. Konrad Turek conducted an analysis of the factors affecting age preferences of Polish employers.

Drawing upon ethnographic data, Campbell's theory of modern hedonism and Lipovetsky's theory of transition from custom to fashion, the paper by **Joanna Zalewska** *Between Custom and Fashion: Digital Exclusion of the Older Generations in the Perspective of Change of Social Practices* proposes a new look at use and disuse of ICT among older people. This study shows that social practices were regulated by customary norms amongst members of the pre-war generations. Thus, ICT was treated with caution since it was perceived with anxiety as 'strangers' i.e. possibly dangerous novelties. Skills associated with using ICT are common social practices in contemporary Polish society. In contrast, the Polish older generation is less likely to use ICT than members of the same generation in other countries.

Małgorzata Halicka, Jerzy Halicki, Emilia Kramkowska and Anna Szafranek present the problem of physical abuse of and violence against older people making reference to classical sociological theory, namely adapting social action theory (represented by, among others, Max Weber and Talcott Parsons) and conflict theory (Randall Collins' conflict theory) in their article *Law Enforcement, the Judiciary and Intimate Partner Violence against the Elderly in Court Files*. The authors point out the persistent lack of adequate mechanisms of law enforcement agencies in supporting older victims as a major problem in this context. They conclude that the ageing of Polish society requires a revision of current solutions in the legal system.

Of course, we appreciate that this Special issue cannot possibly include all authors working in the sociology of ageing in Poland and other CEE countries at present. We regret that a few well-known Polish sociologists are missing from this volume due to competing commitments. We also acknowledge the importance of a number of recent publications in this field, such as Piotr Szukalski's

book on *Solidarność pokoleń. Dylematy relacji międzypokoleniowych* [Solidarity of Generations. Dilemmas of intergenerational relations] (2012). Other publications to be mentioned include the local analysis of seniors situation for Poznań carried out by Prof. Woźniak (1997). And **Piotr Czekanowski's and Jarosław Zalecki's** study of senior citizens in Gdańsk in this volume confirmed that new forms of activity in old age have emerged. Thus, the interpretation of some theories trying to explain older peoples' behavior may need to be revised.

Of course, not all aspects of sociological analysis of ageing could be covered in this Special issue. An important dimension missing is ageing in place, for example (see Niezabitowski 2007, 2012). Finally, the number of contributions from other CEE countries was limited and we regret that we were not able to accommodate articles from all countries in the CEE region. However, we believe that this is just a first step to showcase that the sociology of ageing can make an important contribution to the analysis of ageing societies in CEE and to the solution of resulting social inequality.

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Last but not least, we would like to express our gratitude to the Editor Prof. Jacek Wasilewski and the Editorial Board of *STUDIA SOCIOLOGICZNE* for accepting our proposed special issue for publication in this prestigious academic journal. Moreover, we are grateful to Barbara Gruszka whose fantastic support in preparing the papers for publication was invaluable. Furthermore, we especially thank the reviewers of the presented papers for their time and extremely helpful comments. We hope that the papers published in this special issue will be noticed as strong contributions to the sociological debate in Poland and beyond. Being guest editors on this occasion we hope that this volume will inspire others to submit papers focusing on sociological analysis of ageing societies in Poland and CEE to instigate a lively sociological debate of the challenges ahead.

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Wprowadzenie: w kierunku socjologii starzenia w krajach Europy Środkowej i Wschodniej

Streszczenie

Kraje Europy Środkowej i Wschodniej nie poradziły sobie jeszcze ze wszystkimi problemami wynikającymi z postkomunistycznych procesów transformacji, a stoją w obliczu nowych wyzwań wynikających ze starzenia się społeczeństw. Prognozy demograficzne wskazują, że kraje te będą najbardziej zaawansowanymi ze względu na wiek w Europie w drugiej połowie XXI wieku. Artykuł wskazuje, że socjologia starzenia jest wyjątkowo przygotowana do analizowania pojawiających się problemów społecznych, prezentacji społecznych aspektów starzejących się populacji, ale też oferuje mechanizmy, które mogą być rozwiązaniami tych problemów. W artykule pokazujemy wkład socjologii starzenia w rozwój teoretycznych podstaw analizy starzejących się społeczeństw. Rozpoczynamy od przeglądu międzynarodowego kontekstu teoretycznych podstaw socjologii starzenia, aby zaprezentować krótki przegląd rozwoju socjologii starzenia w krajach Europy Środkowej i Wschodniej, szczególnie w Polsce. Wprowadzenie w artykuły specjalnego numeru „Studiów Socjologicznych” jest też częścią tej dyskusji.

Główne pojęcia: starzenie się ludności; socjologia starzenia; kraje Europy Środkowej i Wschodniej.